



## **Exhibit 300 Assessment and Reporting in WorkLenz**



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## Analyzing an Exhibit 300 in WorkLenz

This WorkLenz guide outlines the process for analyzing an Exhibit 300 in WorkLenz. This includes reviewing Exhibit 300 answers and analyzing the scores using the *Exhibit 300 Scoring Report*. Use this guide in conjunction with the WorkLenz Version 4.5 Training Guide to learn about project portfolio management in WorkLenz.

Before beginning, below is an overview of the taxonomy, or structure, of United States Department of Agriculture (USDA) data in WorkLenz. This structure will help you identify the appropriate level in WorkLenz at which to find your investments.

<i>Portfolio level in WorkLenz</i>	U.S. Department of Agriculture
<i>Program level in WorkLenz</i>	Agency Offices
<i>Project level in WorkLenz</i>	Investments

### Accessing WorkLenz

WorkLenz can be accessed at <http://worklenz.usda.gov>. Log into WorkLenz using your assigned login and password. Your login is the first initial of your first name and your last name. For example,

Name: Brenda Smith  
Login: bsmith

Your initial password is '**password1**.' You will be prompted to change your password after logging in for the first time.



## Reviewing the Exhibit 300 in WorkLenz

1. After logging in, the splash screen will be displayed for a few seconds and you will be taken to the portfolio summary screen (Figure 1). Click on the project icon to view the project list screen.

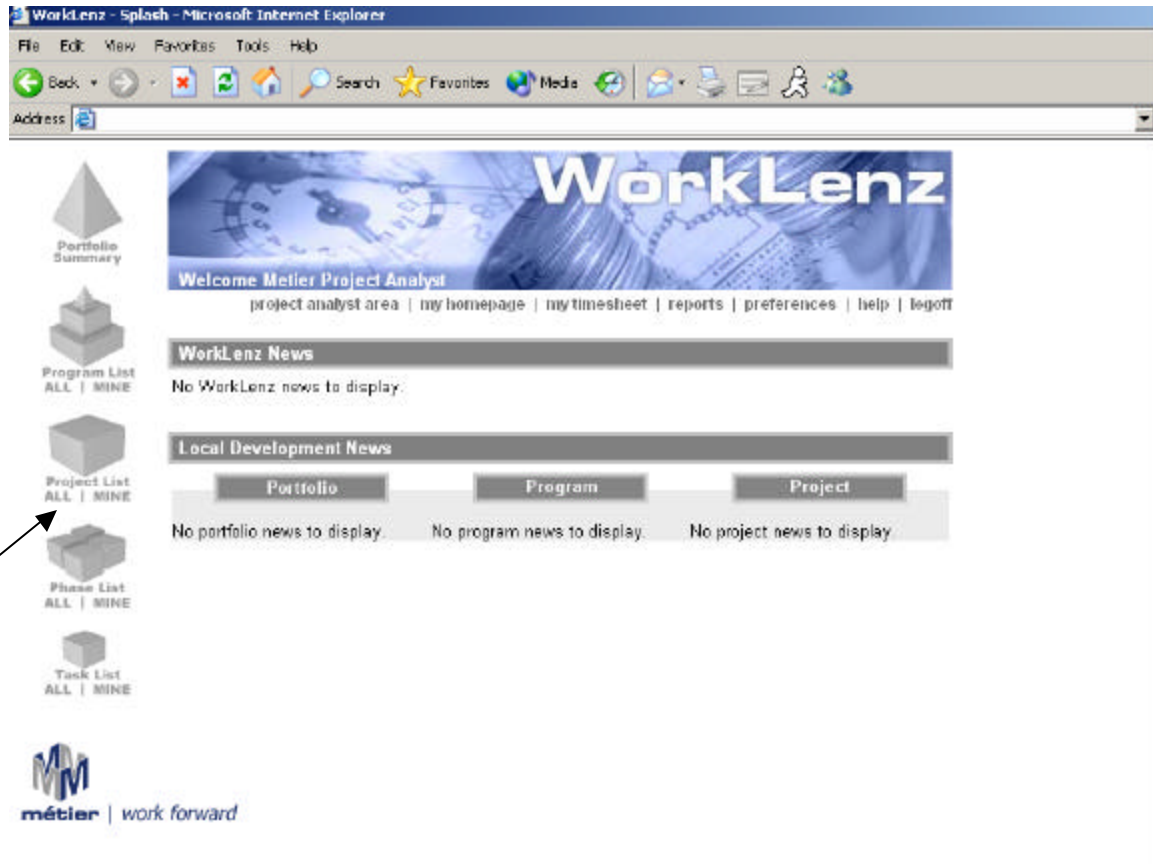


Figure 1

2. Select an investment by clicking on the investment name. You will be directed to the project summary screen for that investment (Figure 2). Click 'Admin' in the Actions bar.



**WorkLenz Project Summary**  
logged in as Metier Project Analyst  
USDA Capital Planning & Investment Control

Portfolio Program Project Phase Task  
Reports Personal Support Logoff

**Project** Last Updated : 08-05-2004 at 12:36 PM

ACTIONS: Update Now Edit Delete News  
Dependencies Risk Notes  
Attachments Admin New Phase

**INFO**

Project Title: USDA Capital Plan...  
Type: Major Control  
Category: Legislative Mand...  
Status: Open  
Estimated Start Date: 10-01-02  
Actual Start Date: 10-01-02

Forecast Snapshot

**SUMMARY**

**Financial**

Current Total Estimated Labor Cost	\$695,465.51
Actual Labor Cost to Date	\$136,262.52
Projected Labor Cost Remaining	\$5,583.74
D/M/E - Equipment Expense To Date	\$79,138.00
D/M/E - Software Expense To Date	\$131,936.00
D/M/E - Services Expense To Date	\$188,864.00
D/M/E - Support Services Expense T...	\$3,452,539.00
D/M/E - Supplies Expense To Date	\$0.00
D/M/E - Personnel Expense To Date	\$155,018.00
D/M/E - Other - DOD ONLY Expense T...	\$0.00
D/M/E - Intra-Govs Payments Expen...	\$0.00
D/M/E - Intra-Govs Collections Expe...	\$0.00
Planning Expense To Date	\$0.00

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**Imported Life Cycle Costs Data**

- Pilot
- REQ: Alternative Analysis
- REQ: Business Case - Develop supporting business case material
- REQ: Cost Planning
- REQ: Design
- REQ: Development - Develop FY06 supporting documents
- REQ: Development - Issue FY 2006 budget review call memo
- REQ: Enterprise Architecture - Manage relationship with EA group
- REQ: Operations - Conduct monthly meetings with agencies and portfolio managers
- REQ: Operations - Manage agencies and portfolio managers mailing list
- REQ: Operations - Manage and support WorkLenz help desk inquiries
- REQ: Operations - Manage relationship with NITC
- REQ: Operations - Manage transition from ITIPS
- REQ: Operations - Manage WorkLenz change control process
- REQ: Operations - Monitor agency-level implementation of WorkLenz
- REQ: Operations - Monitor WorkLenz support contractors
- REQ: Operations - Provide supporting documents to agencies and portfolio managers

Figure 2

- From the administration screen (Figure 3), click the 'Assessments' link to view the assessment list screen. WorkLenz uses assessments to create questionnaires about projects. The Exhibit 300 is one of many assessments available in WorkLenz.



WorkLenz - Project Administration - Microsoft Internet Explorer

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Address

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**WorkLenz** Project Administration  
logged in as Metier Project Analyst  
USDA Capital Planning & Investment Control

Portfolio Program Project Phase Task  
Reports Personal Support Logoff

**Administration Categories**

- Person & Security**
  - Project Team Members
  - Project Roles
  - Project Teams
- Definitions**
  - Strategic Initiatives
  - Benefits
  - Assessments
  - Notifications
- Custom Fields**
  - Custom Field Types
  - Custom Field Selections
- Utilities**
  - Task Title Management
  - Baselines
  - Microsoft Project Import
  - Microsoft Project Export
- News**
  - Project News

**Dependencies**

You will be unable to create some of your items if any of the following are unchecked. Contact your Portfolio Administrator for assistance.

People	✓	Roles	✓
Team Types	✓		

**Responsibilities**

It is suggested that you create these items in the following order:

- 1) Project Roles ✓
- 2) Project Teams ✓
- 3) Project Members ✓

**Portfolio Administration**  
**Program Administration**  
**Leave Project Admin**

**Project Analyst Area**

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Figure 3



4. Click the 'Exhibit 300 FY2006' link to view the Exhibit 300 answers.

WorkLenz - Assessment List - Microsoft Internet Explorer

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**WorkLenz** Project Assessments  
logged in as Metier Project Analyst  
USDA Capital Planning & Investment Control

Portfolio Program Project Phase Task  
Reports Personal Support Logoff

ACTIONS: New Assessment

Assessments defined in this item

This item currently has no Assessments.

Assessments that apply to this item

Assessment Title	Score	Date Last Scored
Exhibit 300 FY2005	28.97	03-21-2004 04:46:40
FEA	This assessment has not been scored.	
Exhibit 300 FY2006	33.86	08-03-2004 05:48:02
Life Cycle Costs		08-03-2004 06:28:38

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Figure 4



There are a number of functionalities for the Exhibit 300 assessment

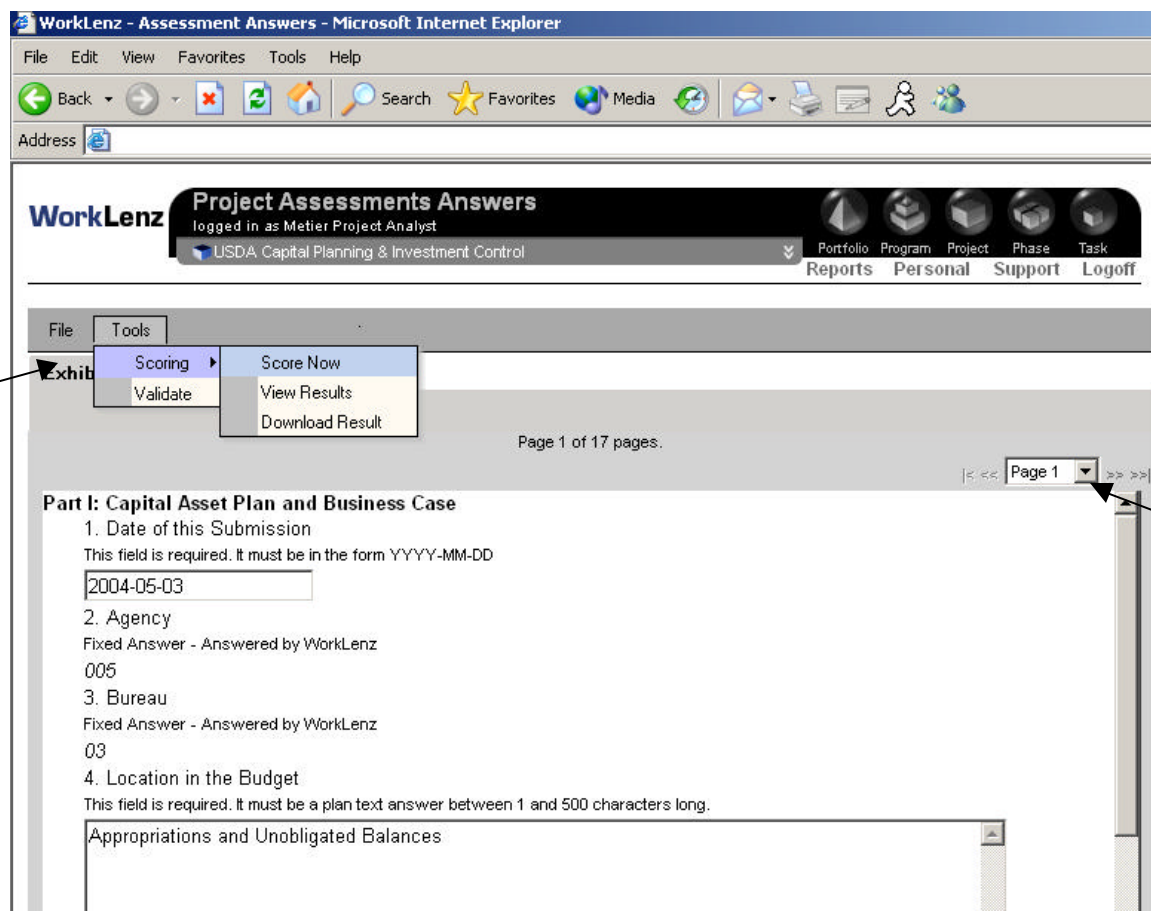


Figure 5

5. The functionalities under “File” include saving both the assessment page and the entire assessment, printing and exiting the Exhibit 300
6. The functionalities under “Tools” include pre-scoring, validating the data, and outputting an html or xml version of the Exhibit 300.
  - a. Pre-scoring: Run a series of algorithms that provides a preview of the score OMB and OCIO will provide to the investment.
  - b. Validate: Assure the data (answers to each question) is in the proper format for submission to OMB.





- c. Output: Provides an HTML or XML version of the Exhibit 300 business case. Note: HTML output converts the answers to text format answers; therefore, paragraph tabs and special characters are stripped out. All the information will still appear in its original format to OMB.
- 7. In the upper righthand side, there is a dropdown list to navigate the pages of the Exhibit 300. A list of the contents of each page is in the appendix.
- 8. Exhibit 300 Questions: There are three types.
  - a. Fixed Answer: Select an answer from a dropdown list
  - b. Essay Format. Open-ended questions that allow an essay formatted answer.
  - c. Tables: For all the tables, you select the number of rows. If you want to edit a table, simply change the number of rows and click “refresh.” All new rows will be added to the bottom of the table. All deleted rows will be taken from the bottom. Rows cannot be inserted or deleted from in between two rows.



WorkLenz - Assessment Answers - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address

**WorkLenz** Project Assessments Answers  
logged in as Metier Project Analyst

USDA Capital Planning & Investment Control

Portfolio Program Project Phase Task  
Reports Personal Support Logoff

File Tools

**Exhibit 300 FY2006**

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other risks identified, include them. Risk assessments should include risk information from all stakeholders and should be performed at the initial concept stage and then monitored and controlled throughout the life-cycle of the investment. Risk assessments for all investments must include: 1) schedule; 2) initial costs; 3) life-cycle costs; 4) technical obsolescence; 5) feasibility; 6) reliability of systems; 7) dependencies and interoperability between this investment and others; 8) surety (asset protection) considerations; 9) risk of creating a monopoly for future procurements; 10) capability of agency to manage the investment; and 11) overall risk of investment failure.

In addition, for IT investments, risk must be discussed in the following categories 12) organizational and change management; 13) business; 14) data/info; 15) technology; 16) strategic; 17) security; 18) privacy; and 19) project resources. For security risks, identify under the Description column the level of risk as high, medium, or basic. What aspect of security determines the level of risk, i.e., the need for confidentiality of information, availability of information or the system, reliability of the information or system? Under the Current Status column, list the milestones remaining to mitigate the risk.

I. F. 1. Please complete the Risk Inventory and Assessment Table.

This table must contain at least one row. Date identified is required and must be in the form YYYY-MM-DD. Risk Area is required and must be selected from the drop down box. Probability of occurrence is also required and must be selected from the drop down box. Description, Strategy for Mitigation, and current status can be entered in plain text, XHTML or Rich Text.

Rows

19 Refresh

Date Identified (YYYY-MM-DD)	Area of Risk	Description	Prob
2003-08-15	1 - Schedule	Decision Delay (e.g.	Basic
1997-10-01	2 - Initial Costs	Because the tools	Basic
2003-08-15	3 - Life-Cycle Costs	Costs may overrun	High
2003-08-15	4 - Technical	The rapidly evolving	Basic
1997-10-01	5 - Feasibility	Innovative	Basic

Figure 6



### Using the *Exhibit 300 Investment Scoring Report*

1. Click the 'Reports' link in the utility menu (Figure 4) to launch the Report Center. This menu is available on the splash screen (the first screen seen after logging in) or the upper right hand corner summary screens.

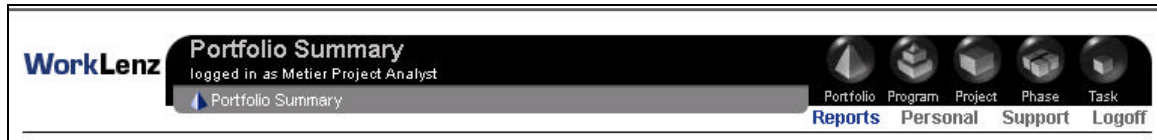


Figure 7

2. The Report Center will open in a second browser window. The *Exhibit 300 Investment Scoring Report* is available at the portfolio, program and project levels. Select the level you would like to begin at by clicking on the appropriate tab (Figure 5).



Figure 8

3. Expand the 'Performance' link and the 'Custom USDA' link to select the *Exhibit 300 FY2006 Scoring Report* (Figure 9).
  - d. Portfolio level – Click 'work forward.'
  - e. Program level – Select a program office and click 'work forward.'
  - f. Project level – Select a program office and an investment and click 'work forward.'

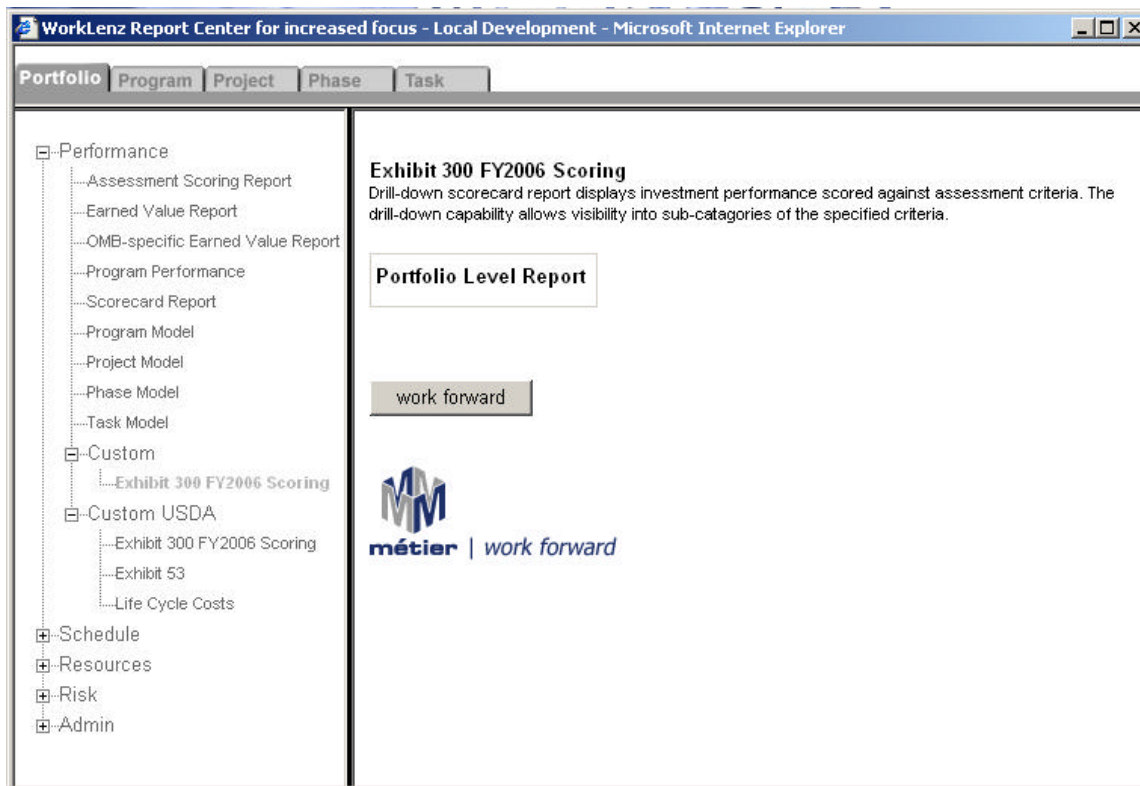


Figure 9

4. The report uses green, yellow and red bubbles to indicate performance from the program office level down to the question level. Click on the section that you would like more detail on to drill down a level in the report (Figure 10).



Overall score			
		Project Score	Date Last Scored
Overall		34.32	08/03/04

[View legend](#)


Score breakdown				
		Section Score	Agency Average	Department Average
President's Management Agenda		2.50	2.50	3.59
Performance Goals		3.60	3.60	3.20
Project Management		3.43	3.43	3.45
Alternative Analysis		4.54	4.54	3.87
Risk Management		4.75	4.75	4.01

Figure 10

- The Agency Average represents the average score for all investments that fall under the particular USDA agency. Similarly, the USDA Average represents the average score for all USDA investments.



## Appendix

### Order of the Exhibit 300 in the Portfolio Assessment Engine

Pages 1 through 5 of the Exhibit 300 contain questions designed to collect general background information about the investment.

Section I.B. of the Exhibit 300, ***Justification***, begins about halfway down page 5 and concludes on page 6.

Section I.C. of the Exhibit 300, ***Performance Goals and Measures (All Assets)***, begins at the bottom of page 6 and concludes on page 7.

Section I.D. of the Exhibit 300, ***Project Management (Investment Management)***, begins in the middle of page 7 and concludes on page 8.

Section I.E. of the Exhibit 300, ***Alternatives Analysis***, begins on page 8 and concludes on page 9.

Section I.F. of the Exhibit 300, ***Risk Inventory and Assessment***, begins in the middle of page 9 and concludes at the bottom of page 9.

Section I.G. of the Exhibit 300, ***Acquisition Strategy***, begins at the bottom of page 9 and concludes on page 11.

Section I.H. of the Exhibit 300, ***Project (Investment) and Funding Plan***, begins at the top of page 11 and concludes on page 13.

Section II.A. of the Exhibit 300, ***Enterprise Architecture***, begins at the top of page 14 and concludes on page 16.

Section II.B. of the Exhibit 300, ***Security and Privacy***, begins on page 16 and concludes on page 17.

Section II.C. of the Exhibit 300, ***Government Paperwork Elimination Act (GPEA)***, begins on page 17 and is the last section of the Exhibit 300.